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February 20, 2008

AGENDA ITEM 4g

TO: MEMBERS OF THE HEALTH BENEFITS COMMITTEE

I. SUBJECT: Ogilvy Public Relations Report for CalPERS:
Communicating with Seniors

II. PROGRAM: Health Benefits, Public Affairs

III. RECOMMENDATION: Information Only

IV. INTRODUCTION:

The Office of Employer and Member Health Services (EMHS) and the Office of Public Affairs (PAOF) jointly commissioned the attached report in an effort to better understand how CalPERS can effectively communicate with its senior population. Specifically, we were seeking validation and feedback that our communication with senior members was clear, effective and well-received.

The report – *Communicating with Seniors* – was completed by Ogilvy Public Relations Worldwide (Ogilvy), an international public relations, communications and marketing firm with a local office in Sacramento.

V. BACKGROUND:

The Office of Employer and Member Health Services disseminates information to age 60+ members through a variety of communication materials, including:

- Letters from the Health Benefits Branch
- Member publications
- CalPERS Web Site
- Newsletter articles (PERSpective, constituent newsletters, etc.)
- Public presentations to retiree organizations

CalPERS requested Ogilvy to assess approximately 6 months of recent CalPERS communication to seniors; explore “best practices” in senior communication; and, make recommendations on how CalPERS can improve its communication to its senior population.

VI. ANALYSIS:

Ogilvy used five different methodologies as part of its analysis. They included:

- Member meetings – mini focus groups
 - Ogilvy solicited feedback from retirees attending four separate CSEA and RPEA meetings in northern and southern California.
- Web site review
 - Ogilvy's 360 Digital Influence practice reviewed and assessed the CalPERS Web site for usability, content, accessibility, and visibility.
- Ogilvy staff evaluations
 - Seven senior Ogilvy staff reviewed and rated publications and communication materials provided by CalPERS.
- Best practice research
 - Ogilvy conducted interviews with six public and private organizations whose businesses require that they communicate effectively with seniors. While Ogilvy contacted 12 organizations, only six agreed to be interviewed. They included:
 - Del Webb Senior Living Communities
 - The Alzheimer's Association of Sacramento
 - The Area 4 Agency on Aging
 - Kathleen First, Senior Care Consultant and Trainer
 - California Gray Panthers
 - The Congress of California Seniors
- Publication review analysis
 - Ogilvy researched a Canadian publication specifically dedicated to examining best practices about communicating with older citizens.

Summary of Report Findings

While the research was specifically aimed at assessing health communications, the general findings of the review may provide valuable insights into the communication efforts of our other business lines especially as they relate to our senior audience. Below are the general findings:

- Overall, CalPERS communication tools – from our newsletters to postcards – are well-received.

- Members believe they are kept well-informed, but small changes such as increasing the font size, calling out actions that we need them to make, and tailoring photos to the audience, would help our communications.
- As expected, our senior population has difficulty with our phone system and would prefer to speak directly to staff. In addition, when speaking with staff their hope is that the CalPERS representative will have the answers to all questions to avoid being transferred through the system.
- Ogilvy's report provided some recommendations for improving our Web site. PAOF is already taking action on a number of these findings and will be following up with Ogilvy's 360 Digital Influence practice to ensure a positive, effective user experience for our senior audience and all CalPERS members.

VII. STRATEGIC PLAN:

This item supports CalPERS Strategic Plan Goal 10 – “Develop and administer quality, sustainable health benefit programs that are responsive to, and valued by, enrollees and employers”, and Strategic Plan Goal 11 – “Promote the ability of members and employers to make informed decisions resulting in improved lifestyle choices and improved health outcomes.”

VIII. RESULTS/COSTS:

The CalPERS costs associated with this item are included in the annual budget of the Health Benefits Branch.

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Attachment